IFA Compliance Kaizen Event Report Out

"Quality Compliance 842"

May 6-9, 2008

Why did we do this?

Bret Mills

Director

Iowa Finance Authority

The "Quality Compliance 842" Team
Roger

Team Members

- **Team leader**   **Mike Rohlf, DOM**
- **Sub-team leader** **Brian Sullivan, IFA**
- **Consultant**   **Tom Morin, Consultant TBM**
- **Members**   **Michele Stump, IFA**
  Scott McClure , IFA
  Mike Sharp , IFA
  Nancy (Pete) Peterson , IFA
  Alyson Fleming , IFA
  Sheri Krohn , IFA
  Steve Harvey , IFA
  Stacy Cunningham , IFA
  Carole Vipond , IFA
  Glenda Gaumer , IFA
  Roger Brown , IFA
  Grace Robertson, IRS
  Ranae Ridlen, HUD
  Bret Mills, IFA

Scope
Mike

➢ **This event will focus on streamlining the Section 8 management Occupancy Review (MOR) and Section 42 review from the time we establish an annual work plan (7/1 for MOR and 1/1 for Section 42) to the time the MOR is closed or the 8823 is issued.**

Goals
Alyson

1. Reduce overtime by 100%
2. Reduce section 8 and section 42 report lead time by 50%
3. Reduce postage by 50%
4. Reduce quality control variability findings for 80% success (passes 1st time through)
5. Reduce paperwork to carry around by 80%

Objectives
Scott

1. Streamline the process to allow the ability to increase productivity.

2. Identify loop backs and re-work.

3. Identify inconsistencies in the process.

4. Eliminate overtime.

5. Reduce the amount of stress.

Objectives
Scott

6. Examine our structure and improve how we run the process

7. Improve communication between each other and constituents

8. Identify what is at risk/cost vs. benefit

9. Identify opportunities for automation

Kaizen Methodology
Mike Rohlf

➢ Clear objectives

➢ Team process

➢ Tight focus on time

➢ Quick & simple

➢ Necessary resources immediately available

➢ Immediate results (new process functioning by end of week)

➢ 5S "mindset", use the steps to support the event activities

Current Process-Section 8
Steve

Current Process – Section 42
Steve

■ This process has been under construction prior to this Kaizen event.

Brainstorming
Glenda

- 66 ideas to improve the process. Some are:
  - Better Automation-9834 while on site; electronically to build report-tenant file work
  - Shorten MOR report
    - required info only
  - Standardized language for tenant selection plan (customers also)
  - QC limited to HUD requirement (ACC)
  - Quality <u>control</u> vs. Systemic Quality <u>Improvement</u> so mistakes aren't made (gotcha)
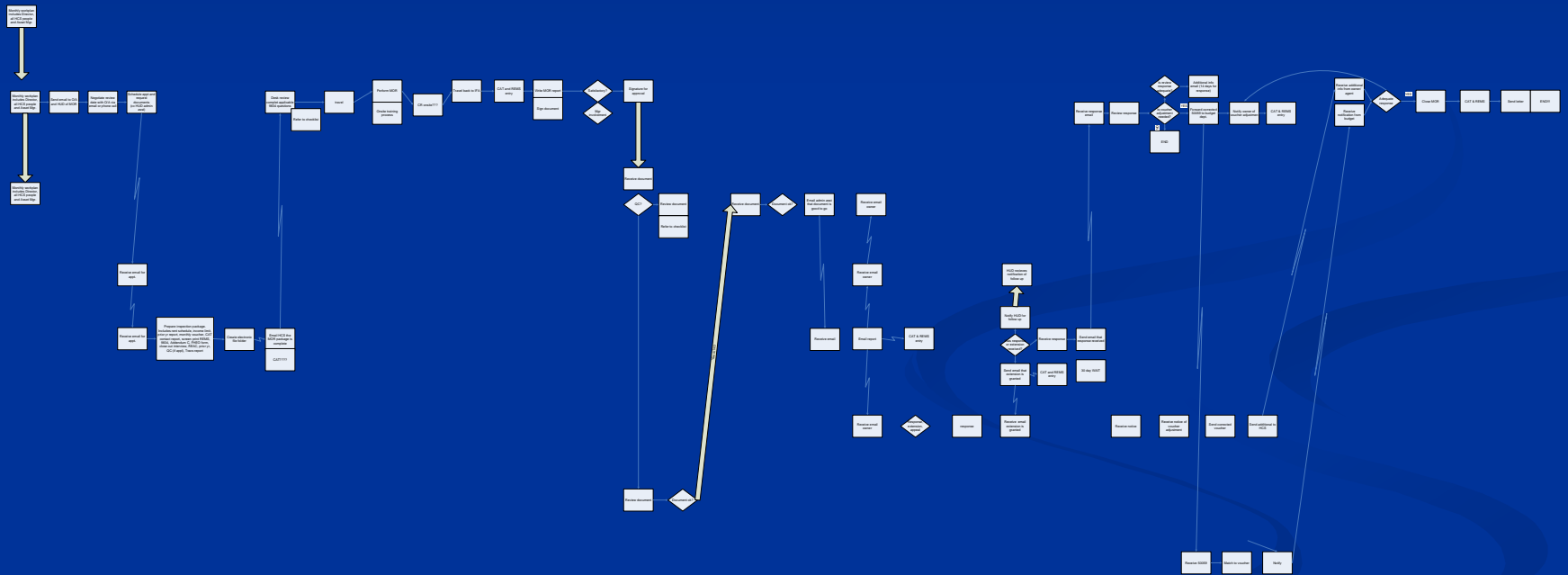
Brainstorming-continued
Glenda

- Provide printers/scanner/copier to HCS
  - Home and road
  - Car chargers for computers
  - Cellular internet
- Stop printing tracs reports
- Checklist for REMS entry – don't print and scan

What would the perfect report look like?
Michele

- Checklist includes all items needed and QC does not deviate from list

- HC's can't deviate from list

- Consistent information from upper mgmt

- Determine difference between findings and recommendations on 9834

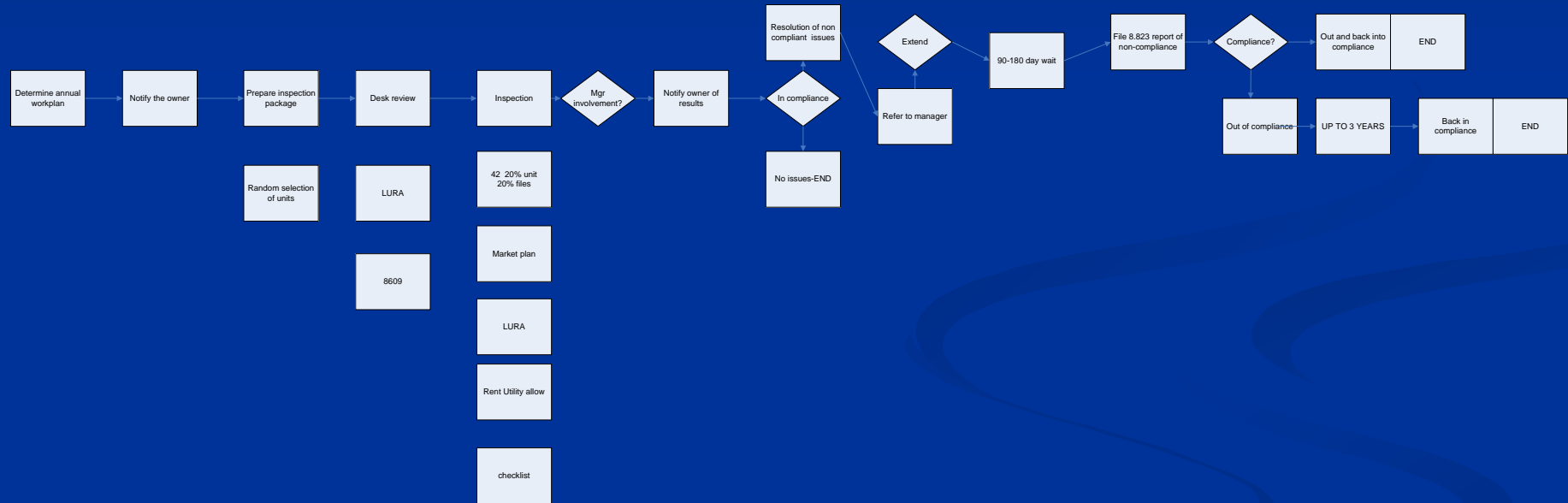- Why are reports still 8-10 pgs long?

- Trust and accountability

Checklists
Pete

Technology
Brian

Results
Alyson

	Current Section 8 Process	New Section 8 Process	% of Change	
# of Steps	125	52		
# of Hand offs	43	21		
# of Decisions	15	8		
# of Value Added Steps	2	2		
# of Delays	9	4		
Best Completion Time Line	44 days	30 days		
Worst Completion Time Line	603 days	104 (projected)		

Results
Pete

	Current Section 42 Process	New Section 42 Process	% of Change	
# of Steps	Under construction	18		
# of Hand offs		TBD		
# of Decisions		5		
# of Value Added Steps		2		
# of Delays		2		
Best Completion Time Line		30 days		
Worst Completion Time Line		150 days		

Homework
Carole

Item	Item Description	Person Responsible	Due Date
1	Develop 7-8 checklists for quality	All HCS	7/8
2	Define MOR narrative correct report	Mike	7/8
3	Define Tenant file documents problems	Michele	6/4
4	Notice to owners of electronic format from here on out	Roger	6/4
5	Exception for manager involvement (42) list	Roger	6/4
6	42 issues and how to work them out	Pete	6/4

Homework
???

Item	Item Description	Person Responsible	Due Date
7	Check on amending the RFP to HUD	Ranae	5/15
8	Get batteries for laptops	Steve	5/15
9	Get car chargers for laptops	Steve	5/15
10	Investigate printers/scanners for field	Steve	5/15
11	Capture signature at closing	Steve	5/15
12	Electronic signature to Owners	Ranae/Roger	6/4

Homework
???

Item	Item Description	Person Responsible	Due Date
13	CAT workflow for MOR process	Roger	6/4
14	Develop checklist for Admin Assist for what to email to HUD, HCS and Owner/Agent	Brian	5/13
15	Review current standard file naming convention	Brian/Glenda	6/4
16	Build trust in the team	ALL	5/9
17	Determine whether or not to keep a hard copy service file	Roger/Sheri	6/4
18	Investigate mobile internet	Steve	6/4

Homework
???

Item	Item Description	Person Responsible	Due Date
19	Get validity checks on tenant worksheets, 9834 (form validation)	Steve	7/8
20	Develop training session for acrobat	Brian	5/20
21	Develop training session on how to use the tablet	Alyson	5/20
22	Training for electronic transmission for Admin assists	Alyson	5/20
23	Capture LURA and 8609 data for electronic files	Roger	6/4
24	Draft policies and procedures	Scott	7/8

Homework
???

Item	Item Description	Person Responsible	Due Date
25	Address file security	Steve	5/15

Team Member's Experience
Ranae
Pete

Comments:

Mike Rohlf,
Lean Enterprise Administrator

Comments:

Tom Morin,
Consultant TBM

We welcome your questions and comments!